

SENATORS AND OFFICERS POST-TRAVEL DISCLOSURE OF TRAVEL EXPENSES

Date/Time Stamp: 17 MAR 27 AM 11:46

This disclosure, along with a copy of the Private Sponsor Travel Certification Form and all attachments, MUST be provided to the Office of Public Records, Room 232 of the Hart Building, within 30 days after the travel is completed.

Tom Udall

In compliance with Rule 35.2(a) and (c), I _____, make the following
(Name of Senator/Officer)

disclosures with respect to travel expenses that have been or will be reimbursed/paid for me.

Private Sponsor(s) (list all): Alliance for Health Reform, a non-partisan 501(c)3 public charity and The Commonwealth Fund, a foundation that supports independent research on health and social issues and makes grant to improve health care practice and policy.

Travel date(s): Friday, March 3 - Sunday, March 5, 2017

Destination(s): The Airlie Center, Warrenton, VA

Name of accompanying family member (if any): Jill Cooper Udall

Relationship to Member/Officer: ☒ Spouse ☐ Child

FILL IN THE APPROPRIATE LINES. IF THE COST OF LODGING DID NOT INCREASE DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Senator/Officer:

| | Transportation Expenses | Lodging Expenses | Meal Expenses | Other Expenses (Amount & Description) |
|---|-------------------------|------------------|---------------|---------------------------------------|
| <input checked="" type="checkbox"/> Good Faith Estimate <input type="checkbox"/> Actual Amount | \$0 | \$188 | \$170.30 | \$20 (folder with materials) |

Expenses for Accompanying Spouse or Dependent Child (if applicable)

| | Transportation Expenses | Lodging Expenses | Meal Expenses | Other Expenses (Amount & Description) |
|---|-------------------------|------------------|---------------|---------------------------------------|
| <input checked="" type="checkbox"/> Good Faith Estimate <input type="checkbox"/> Actual Amount | \$0 | | \$170.30 | \$20 (folder with materials) |

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): See attached final itinerary.

I HAVE MADE A DETERMINATION THAT THE TRAVEL DESCRIBED ABOVE WAS IN CONNECTION WITH MY DUTIES AS AN OFFICEHOLDER, AND DID NOT CREATE THE APPEARANCE THAT I WAS USING PUBLIC OFFICE FOR PRIVATE GAIN.

3/27/17
(Date)

Tom Udall
(Signature of Senator/Officer)

Invitation for Sen. Udall for the 2017 Bipartisan Congressional Health Policy Conference

Good morning, Devon.

On behalf of The Commonwealth Fund and the Alliance for Health Reform, I would like to invite Senator Udall to the 19th Annual Bipartisan Congressional Health Policy Conference for Members of Congress from March 3-5, 2017 in Warrenton, Virginia at The Airlie Center, only 60 minutes from the Capitol. This will be a unique opportunity for the Senator to have *off-the-record discussions with colleagues* from both sides of the aisle and both chambers.

The theme for the 2017 conference is **“Achieving a Patient-Centered Health Care System.”**

Health policy is more complex than ever, and there is much at stake for the constituents of New Mexico and throughout every congressional district. In the midst of policy debates about the future of the U.S. health system, patients’ perspectives often get lost. This year’s conference will focus on the patients and how potential changes to health policies will impact their ability to access high-quality, affordable care. Each panel will feature some of the most renowned analysts, stakeholders, and officials in the field. They will also have representation from patients themselves. Our speakers will make brief remarks and set the stage for an open discussion between your boss and other members of Congress, allowing for in-depth bipartisan conversations with our experts and patient representatives as resources.

Additional information on panel topics, confirmed speakers, and logistics can be found at congressionalhealthpolicy.org/2017agenda.

The conference is organized and sponsored by The Commonwealth Fund and the Alliance for Health Reform. No government, corporate, or special interest funds are involved. The Alliance, through a grant from Commonwealth, will pay all expenses, including lodging and meals, for the Senator, a spouse or child, and one senior staff member. The Alliance will provide a shuttle service to Airlie from Capitol Hill for Members, their guest, and staff that will depart Friday afternoon and return to Capitol Hill on Sunday.

I hope that the Senator will be able to join us for this unparalleled opportunity. I encourage your staff to contact me with any questions or if any other additional information is needed. I can be reached via email at kappenzeller@allhealth.org or by phone at (202)789-2300.

We would appreciate the **response by January 25** to ensure enough time for all arrangements and for the **submission of all relevant ethics forms, which are due February 1, 2017.**

Thank you again for considering our invitation. I hope that Senator Udall will be able to join us this March.

Best regards,
Kelly

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The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

- Private Sponsor Certification - Page 1 of 4

9. USE ONLY IF YOU CHECKED QUESTION 6(B)

USE ONLY IF YOU CHECKED QUESTION 5(D)
I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

- ☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip. _____

OR

- ☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (see questions 6 and 10).

- OR -

- ☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. USE ONLY IF YOU CHECKED QUESTION 9(B)

USE ONLY IF YOU CHECKED QUESTION 2(B)
If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

The Alliance for Health Reform and The Commonwealth Fund jointly formulate the agenda, recruit appropriate speakers, and develop and compile resource materials for conference curriculum. Alliance staff also organize lodging, travel, and event management for the conference with input from the Fund.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:
(see attached page)

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:
(see attached page)

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

(see attached page)

16. Total Expenses for Each Participant:

| | Transportation Expenses | Lodging Expenses | Meal Expenses | Other Expenses |
|--|----------------------------|---------------------|------------------|--------------------------------|
| <input checked="" type="checkbox"/> Good Faith estimate <input type="checkbox"/> Actual Amounts | \$26 | \$188 | \$170.30 | \$20; folder with materials |

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip is organized specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

(see attached page)

19. Name and location of hotel or other lodging facility:

Airlie; 6809 Airlie Road Warrenton, VA 20187

20. Reason(s) for selecting hotel or other lodging facility:

(see attached page)

25. I hereby *certify* that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor):

David R. Beck

Signature of Travel Sponsor:

Name and Title: David Blumenthal, President

Name of Organization: The Commonwealth Fund

Address: One E. 75th St. New York, NY 10021

Telephone Number: (212) 606-3500

Fax Number: (212) 606-3500

E-mail Address: db@cmwf.org

Continued answers from Questions 2, 13, 14, 15, 18, and 20

1. SPONSOR(S) OF THE TRIP (PLEASE LIST ALL SPONSORS)

Alliance for Health Reform, a non-partisan 501(c)3 public charity, and The Commonwealth Fund, a foundation that supports independent research on health and social issues and makes grants to improve health care practice and policy.

- 2. DESCRIPTION OF THE TRIP:**

The conference provides an opportunity for members of Congress and their senior health staff from both parties to learn more about timely health policy topics in informal, off-the-record sessions with a select group of health policy experts from a wide variety of perspectives. There is also ample opportunity for interchange among the Members of Congress in attendance. The event aims to educate, not to advance any political or ideological position.

13. BRIEFLY DESCRIBE THE STATED MISSION OF EACH SPONSOR AND HOW THE PURPOSE OF THE TRIP RELATES TO THAT MISSION:

The Alliance is a non-partisan, 501(c)(3) public charity dedicated to providing governmental leaders with expert analysis and information on current health care-related issues, solutions, legislative proposals and industry conditions. The Alliance has been a resource providing objective, fact-based, unbiased information to members of the Senate/House on both sides of the aisle since its inception in 1991. The Commonwealth Fund is a foundation that supports independent research on health and social issues and makes grants to improve health care practice and policy. Since the purpose of the trip is to educate leaders about the roots of the nation's health care problems and the competing proposals for changing the system in ways that will help improve health care practice and policy, the trip fits perfectly into the mission of both organizations. (allhealth.org) (cmwf.org)

14. BRIEFLY DESCRIBE EACH SPONSOR'S PRIOR HISTORY OF SPONSORING CONGRESSIONAL TRIPS:

This is the 19th Annual Bipartisan Congressional Health Policy Conference to which members of the Senate and House of Representatives have been invited and have participated. In all, there have been 50 unique members who have attended since the Alliance and The Fund began jointly sponsoring the event in 2006. From 1995-2005, The Commonwealth Fund sponsored the conference with the Kennedy School of Government at Harvard.

15. BRIEFLY DESCRIBE THE EDUCATIONAL ACTIVITIES PERFORMED BY EACH SPONSOR (OTHER THAN SPONSORING CONGRESSIONAL TRIPS):

ESSENTIALS

The Alliance has a long history of performing educational activities. Since 1991, the Alliance has organized more than 500 forums in Washington and around the nation, each presenting a balance of expert views. The Alliance has published comprehensive guides for journalists on covering health issues and regularly produces online toolkits on current topics.

18. REASON FOR SELECTING THE LOCATION OF THE EVENT OR TRIP

The location was selected because of a need to balance proximity to Capitol Hill in order to accommodate the schedules of Members and staff and achieve our goal of reduced travel costs by allowing for bus or carpooling as the mode of transportation and yet be located outside of the Senate duty station. The Airlie is located in Fauquier County, Virginia.

The Alliance for Health Reform, in close collaboration with the Commonwealth Fund, undertook an extensive search of properties that met several key criteria:

- **Location:** Located a reasonable driving distance from Washington, D.C. and major airports for the convenience of Members of Congress and participating speakers, yet outside of the Washington, D.C. "duty station" for Members of Congress and their staff. The Airlie is located at 6809 Airlie Road in Warrington, Virginia, approximately 40-60 minutes from Dulles Airport (depending on traffic), and a 1-2 hour drive from the Capitol, depending on traffic. It is located in Fauquier County, Virginia. Other facilities we considered were either a significant driving distance from the
 - **Facilities and logistics:** Conference facilities and rooming arrangements that can accommodate the conference; criteria include as space that can ensure safety and privacy for the Members, and any other high profile speakers that attend; meeting space and overnight accommodations that are located on the same property so as not to add additional travel time and distract from substantive programming; suitability of conference facilities and A/V capacity; and conference support staff that's suitable for hosting a conference as large and logistically complex as ours.
- Cost:** Reasonable costs that can meet the conference budget. The Alliance has negotiated the lowest possible food costs at Airlie, selecting the most reasonable food costs on the available menu. These are the market rates for conference facilities that meet all of our criteria.
- **Timing:** preferred date availability to coincide with anticipated congressional availability

After this extensive search and a site visit by Alliance and Fund staff, we believe Airlie is the best option for the 2017 conference.

Other facilities considered: A list of additional properties considered for the conference is shown below. Highlighted properties were visited but found not to have adequate facilities for our conference, and other conference facilities were assessed via internet and phone research. Many of the other venues listed do not have adequate facilities for our conference or are a longer drive from major airports than the Airlie, potentially creating an obstacle to attendance by Members of Congress, making it more difficult to recruit top-quality speakers, and increasing transportation costs. The other venues with appropriate facilities had comparable or more expensive food costs compared to the Airlie.

20. REASONS(S) FOR SELECTING HOTEL OR OTHER LODGING FACILITY

In addition to a location that met the goals described in 18, above, we sought a facility that was low cost yet had sufficiently capable conference facilities and staff with modern audio/visual accommodations. The Airlie meets those needs. It has an excellent reputation for its conference management services with a highly qualified staff. Yet it is by no means luxurious. It is modestly comfortable which will facilitate the number of hours that conference participants will participate in learning sessions and issue discussions.

2025 RELEASE UNDER E.O. 14176



Achieving a Patient-Centered Health System

| | |
|----------------|--|
| 3:00 p.m. | Registration and Check-In Begin (<i>Airlie House Lobby</i>) |
| 6:00-7:00 p.m. | Opening Reception (<i>Pavilion</i>) |
| 7:00-9:00 p.m. | Dinner (<i>Pavilion</i>) |

Robert Graham, Chairman, Alliance for Health Reform
Benjamin Chu, Chairman, The Commonwealth Fund; President and CEO,
Memorial Hermann Health System

Keynote Speakers:

- Steven Keating, Patient Advocate
- Sharon Terry, President and Chief Executive Officer, Genetic Alliance

David Blumenthal, President, The Commonwealth Fund

7:00 a.m. Breakfast Buffet Opens (Jefferson Room)

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8:00-8:45 a.m. **2. Breakfast Discussion: Building Delivery Systems with the Patient at the Center*** (*Federal Room*)

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**Breakfast will available next door in the Jefferson Room. Please feel free to enjoy breakfast in the Jefferson Room before the panel or to bring a plate into the Federal Room for the panel discussion.*

Moderator:

Maureen Bisognano, President Emerita, Senior Fellow, Institute for Healthcare Improvement; Board Member, The Commonwealth Fund

Panelists:

- Whitney Bowman-Zatzkin, Director, Flip the Clinic
- K. Eric De Jonge, Director of Geriatrics, MedStar Washington Hospital Center

9:00-10:15 a.m. **3. Improving Care and Lowering Costs: Medicare's Role in Managing Chronic Disease** (*Federal Room*)

9:00-10:15 a.m. **3. Improving Care and Lowering Costs: Medicare's Role in Managing Chronic Disease** (*Federal Room*)

Moderator:

Melinda Abrams, Vice President, Delivery System Reform, The Commonwealth Fund

Panelists:

- Kenneth Thorpe, Chairman, Partnership to Fight Chronic Disease; Robert W. Woodruff Professor and Chair, Department of Health Policy and Management, Rollins School of Public Health, Emory University
- Rebecca Onie, Co-Founder and Chief Executive Officer, Health Leads
- Adam Boehler, Co-Founder and Chief Executive Officer, Landmark Health

10:15-11:30 a.m. 4. Caring for Dually Eligible Medicare-Medicaid Patients (Federal Room)

10:15-11:30 a.m. 4. Caring for Dually Eligible Medicare-Medicaid Patients (Federal Room)

Moderator:

Donald Moulds, Executive Vice President for Programs, The Commonwealth Fund

Panelists:

- Melanie Bella, Independent Consultant and Former Director, Medicare-Medicaid Coordination Office, Centers for Medicare and Medicaid Services
- Cindi Jones, Director, Department of Medical Assistance Services, Commonwealth of Virginia
- Toby Douglas, Senior Vice President for Medicaid Solutions, Centene Corporation

11:45-1:00 p.m.

5. Lunch Discussion: Prescription Drug Spending and Policy – Where Are We and Where Are We Headed? (*Pavilion*)

Keynote Speakers:

- Mark McClellan, Director and Robert J. Margolis, MD, Professor of Business, Medicine and Health Policy, Duke University
- Henry Waxman, Chairman, Waxman Strategies

Moderator:

Margaret Hamburg, Foreign Secretary, National Academy of Medicine; Former Commissioner, Food and Drug Administration; Board Member, The Commonwealth Fund

1:15-2:15 p.m.

6. Continuing the Conversation: Ensuring Patient Access to Affordable Prescription Drugs (*Federal Room*)

Moderator:

Shawn Bishop, Vice President, Controlling Health Care Costs and Advancing Medicare, The Commonwealth Fund

Panelists:

- Elizabeth Seeley, Adjunct Lecturer on Health Policy and Management, Harvard T.H. Chan School of Public Health
- Aaron Kesselheim, Associate Professor, Harvard Medical School; Faculty Member, Brigham and Women's Hospital
- Diana Zuckerman, President, National Center for Health Research

2:15-3:30 p.m.

7. Democratization of Health Data: Getting Usable Health Information in the Hands of Patients and Caregivers (*Federal Room*)

Moderator:

Eric Schneider, Senior Vice President for Policy and Research, The Commonwealth Fund

Panelists:

- Christine Bechtel, President, X4 Health
- Jeremy Marut, Director of Enterprise Architecture, Hackensack University Medical Center
- Jim Jirjis, Chief Health Information Officer and Vice President, Clinical Services Group, HCA
- Karen DeSalvo, Former Acting Assistant Secretary of Health, U.S. Department of Health and Human Services

6:30-7:30 p.m.

Reception (*Pavilion*)

LESOTHO

Keynote Speaker:

- Moderator:**

Sunday, March 5

Breakfast Buffet (*Jefferson Room*)

9. Charting the Future of Medicaid and the Role of the States *(Federal Room)*

Sheila Burke, Faculty Research Fellow, Malcolm Wiener Center for Social Policy;
Adjunct Lecturer, John F. Kennedy School of Government, Harvard University;
Board Member, The Commonwealth Fund

- Frederick Isasi, Former Director, Health Division, Center for Best Practices, National Governors Association
- Joe Moser, Director, Indiana Medicaid
- Thomas Betlach, Director, Arizona Health Care Cost Containment System

10. Stabilizing the Private Insurance Market *(Federal Room)*

Sheila Burke, Faculty Research Fellow, Malcolm Wiener Center for Social Policy;
Adjunct Lecturer, John F. Kennedy School of Government, Harvard University;
Board Member, The Commonwealth Fund

- Joel Ario, Managing Director, Manatt Health
- Cori Uccello, Actuary and Senior Health Fellow, American Academy of Actuaries
- Avik Roy, President, Foundation for Research on Equal Opportunity
- Peter Lee, Executive Director, Covered California

Closing Remarks

Adjourn (*boxed lunches available*)

U.S. Senate
Committee on Ethics
PRIVATE SPONSOR TRAVEL CERTIFICATION INFORMATION
List of Congressional Invitees for the Bipartisan Congressional Health Policy Conference
March 3-5, 2017

| First Name | Last Name | Credentials | State | Reason for Invitation |
|-------------|------------|-------------|-------|--|
| Lisa | Murkowski | | AK | Member of Committee on Health, Education, Labor & Pensions |
| Dan | Sullivan | | AK | Member of Senate Veterans' Affairs Committee |
| Jeff | Sessions | | AL | Member of the Senate Rural Health Caucus |
| Richard | Shelby | | AL | Member of the Senate Cancer Coalition |
| John | Boozman | | AR | Member of Senate Appropriations Committee |
| Tom | Cotton | | AR | Member of Joint Economic Committee |
| Jeff | Flake | | AZ | Member of Senate Judiciary Committee |
| John | McCain | | AZ | Member of the Senate Rural Health Caucus |
| Kamala | Harris | | CA | Member of the Senate Committee on Budget |
| Dianne | Feinstein | | CA | Member of the Senate Cancer Coalition |
| Michael | Bennet | | CO | Member of Committee on Health, Education, Labor & Pensions |
| Cory | Gardner | | CO | Member of Senate Committee on Small Business and Entrepreneurship |
| Richard | Blumenthal | | CT | Member of Senate Judiciary Committee |
| Christopher | Murphy | | CT | Member of Committee on Health, Education, Labor & Pensions |
| Thomas | Carper | | DE | Member of Committee on Finance |
| Chris | Coons | | DE | Member of Senate Appropriations Committee |
| Bill | Nelson | | FL | Member of Committee on Finance |
| Marco | Rubio | | FL | Member of Senate Committee on Small Business and Entrepreneurship |
| Johnny | Isakson | | GA | Member of Committee on Health, Education, Labor & Pensions |
| David | Perdue | | GA | Member of Senate Budget Committee |
| Mazie | Hirono | | HI | Member of Senate Veterans' Affairs Committee |
| Brian | Schatz | | HI | Member of Senate Appropriations Committee |
| Charles | Grassley | | IA | Member of Committee on Finance |
| Joni | Ernst | | IA | Member of Senate Committee on Small Business and Entrepreneurship |
| Michael | Crapo | | ID | Member of Committee on Finance |
| Jim | Risch | | ID | Member of Congressional Multiple Sclerosis Caucus |
| Richard | Durbin | | IL | Member of the Senate Cancer Coalition |
| Tammy | Duckworth | | IL | Interest in Health Care |
| Todd | Young | | IN | Member of Senate Committee on Health, Education, Labor, and Pensions |
| Joe | Donnelly | | IN | Member of Coalition for Autism Research and Education (CARE) |
| Jerry | Moran | | KS | Member of Senate Appropriations Committee |
| Pat | Roberts | | KS | Member of Committee on Health, Education, Labor & Pensions |
| Mitch | McConnell | | KY | Member of the Senate Rural Health Caucus |
| Rand | Paul | MD | KY | Member of Committee on Health, Education, Labor & Pensions |
| Bill | Cassidy | MD | LA | Member of Committee on Health, Education, Labor & Pensions |
| Elizabeth | Warren | | MA | Member of Committee on Health, Education, Labor & Pensions |
| Edward | Markey | | MA | Member of Coalition for Autism Research and Education (CARE) |
| Benjamin | Cardin | | MD | Member of Committee on Finance |
| Chris | Van Hollen | | MD | Member of Committee on Appropriations |
| Susan | Collins | | ME | Member of Committee on Health, Education, Labor & Pensions |
| Angus | King | | ME | Member of Senate Budget Committee |
| Gary | Peters | | MI | Member of Joint Economic Committee |
| Debbie | Stabenow | | MI | Member of Committee on Finance |
| Al | Franken | | MN | Member of Committee on Health, Education, Labor & Pensions |
| Amy | Klobuchar | | MN | Member of Senate Judiciary Committee |
| Roy | Blunt | | MO | Member of Senate Appropriations Committee |
| Claire | McCaskill | | MO | Member of Congressional Caucus for Women's Issues |
| Thad | Cochran | | MS | Member of the Senate Rural Health Caucus |
| Roger | Wicker | | MS | Member of Senate Budget Committee |
| Steve | Daines | | MT | Member of Senate Appropriations Committee |
| Jon | Tester | | MT | Member of the Senate Rural Health Caucus |

| First Name | Last Name | Credentials | State | Reason for Invitation |
|------------|--------------|-------------|-------|---|
| Richard | Burr | | NC | Member of Committee on Health, Education, Labor & Pensions |
| Thom | Tillis | | NC | Member of Senate Judiciary Committee |
| John | Hoeven | | ND | Member of Senate Appropriations Committee |
| Heidi | Heitkamp | | ND | Member of Senate Diabetes Caucus |
| Deb | Fischer | | NE | Member of Congressional Caucus for Women's Issues |
| Ben | Sasse | | NE | Member of Joint Economic Committee |
| Maggie | Hassan | | NH | Member of Committee on Health, Education, Labor & Pensions |
| Jeanne | Shaheen | | NH | Member of Senate Appropriations Committee |
| Robert | Menendez | | NJ | Member of Committee on Finance |
| Cory | Booker | | NJ | Member of Senate Committee on Small Business and Entrepreneurship |
| Martin | Heinrich | | NM | Member of Joint Economic Committee |
| Tom | Udall | | NM | Member of Senate Appropriations Committee |
| Dean | Heller | | NV | Member of Committee on Finance |
| Catharine | Cortez Matso | | NV | Member of Senate Special Committee on Aging |
| Charles | Schumer | | NY | Member of Committee on Finance |
| Kirsten | Gillibrand | | NY | Member of the Congressional Task Force on Alzheimer's Disease |
| Sherrod | Brown | | OH | Member of Committee on Finance |
| Rob | Portman | | OH | Member of Committee on Finance |
| James | Inhofe | | OK | Member of the Senate Rural Health Caucus |
| James | Lankford | | OK | Member of Senate Appropriations Committee |
| Jeff | Merkley | | OR | Member of Senate Appropriations Committee |
| Ron | Wyden | | OR | Member of Committee on Finance |
| Bob | Casey | | PA | Member of Committee on Health, Education, Labor & Pensions |
| Patrick | Toomey | | PA | Member of Committee on Finance |
| Jack | Reed | | RI | Member of the Senate Cancer Coalition |
| Sheldon | Whitehouse | | RI | Member of Committee on Health, Education, Labor & Pensions |
| Lindsey | Graham | | SC | Member of the Senate Rural Health Caucus |
| Tim | Scott | | SC | Member of Committee on Health, Education, Labor & Pensions |
| Mike | Rounds | | SD | Member of Senate Veterans' Affairs Committee |
| John | Thune | | SD | Member of Committee on Finance |
| Lamar | Alexander | | TN | Member of Committee on Health, Education, Labor & Pensions |
| Bob | Corker | | TN | Member of the Senate Rural Health Caucus |
| John | Comyn | | TX | Member of Committee on Finance |
| Ted | Cruz | | TX | Member of Joint Economic Committee |
| Orrin | Hatch | | UT | Member of Committee on Health, Education, Labor & Pensions |
| Mike | Lee | | UT | Member of Senate Judiciary Committee |
| Tim | Kaine | | VA | Member of Senate Budget Committee |
| Mark | Warner | | VA | Member of Committee on Finance |
| Patrick | Leahy | | VT | Member of the Senate Rural Health Caucus |
| Bernard | Sanders | | VT | Member of Committee on Health, Education, Labor & Pensions |
| Maria | Cantwell | | WA | Member of Committee on Finance |
| Patty | Murray | | WA | Member of Committee on Health, Education, Labor & Pensions |
| Tammy | Baldwin | | WI | Member of Committee on Health, Education, Labor & Pensions |
| Ron | Johnson | | WI | Member of Senate Budget Committee |
| Shelley | Capito | | WV | Member of Senate Appropriations Committee |
| Joe | Manchin | | WV | Member of Senate Veterans' Affairs Committee |
| John | Barrasso | MD | WY | Member of the Senate Rural Health Caucus |
| Michael | Enzi | | WY | Member of Committee on Health, Education, Labor & Pensions |

PRIVATE SPONSOR TRAVEL CERTIFICATION INFORMATION

List of Congressional Staff Invites for the Bipartisan Congressional Health Policy Conference
March 3-5, 2017

| Member | First Name | Last Name | Email | Title |
|------------------------|--------------|-------------|--------------------------------------|-----------|
| Sen. Alexander (R-TN) | Mary-Sumpter | Lapinski | marysumpter_lapinski@help.senate.gov | Health LA |
| Sen. Baldwin (D-WI) | Kathleen | Laird | kathleen_laird@baldwin.senate.gov | Health LA |
| Sen. Barrasso (R-WY) | Jay | Eberle | jay_eberle@barrasso.senate.gov | Health LA |
| Sen. Bennet (D-CO) | Rohini | Kosoglu | rohini_kosoglu@bennet.senate.gov | Health LA |
| Sen. Blumenthal (D-CT) | Laurel | Sakai | laurel_sakai@blumenthal.senate.gov | Health LA |
| Sen. Blunt (R-MO) | Desiree | Mowry | desiree_mowry@blunt.senate.gov | Health LA |
| Sen. Booker (D-NJ) | Ashley | Eden | ashley_eden@booker.senate.gov | Health LA |
| Sen. Boozman (R-AR) | Jennifer | Humphrey | jennifer_humphrey@boozman.senate.gov | Health LA |
| Sen. Brown (D-OH) | Abigail | Duggan | abigail_duggan@brown.senate.gov | Health LA |
| Sen. Burr (R-NC) | Anna | Abram | anna_abram@help.senate.gov | Health LA |
| Sen. Cantwell (D-WA) | Nico | Janssen | nico_janssen@cantwell.senate.gov | Health LA |
| Sen. Capito (R-WV) | Dana | Richter | dana_richter@capito.senate.gov | Health LA |
| Sen. Cardin (D-MD) | Lauren | Jee | lauren_jee@cardin.senate.gov | Health LA |
| Sen. Carper (D-DE) | Lynn | Sha | lynn_sha@carper.senate.gov | Health LA |
| Sen. Casey (D-PA) | Sara | Mabry | sara_mabry@casey.senate.gov | Health LA |
| Sen. Cassidy (R-LA) | Matthew | Gallivan | matt_gallivan@cassidy.senate.gov | Health LA |
| Sen. Cochran (R-MS) | Constance | Payne | constance_payne@cochran.senate.gov | Health LA |
| Sen. Collins (R-ME) | Priscilla | Hanley | priscilla_hanley@aging.senate.gov | Health LA |
| Sen. Coons (D-DE) | Jacqueline | Thomas | jacqueline_thomas@coons.senate.gov | Health LA |
| Sen. Corker (R-TN) | Hayly | Humphreys | hayly_humphreys@corker.senate.gov | Health LA |
| Sen. Cornyn (R-TX) | Beth | Nelson | beth_nelson@cornyn.senate.gov | Health LA |
| Sen. Cotton (R-AR) | Jonathan | Hiler | jonathan_hiler@cotton.senate.gov | Health LA |
| Sen. Crapo (R-ID) | Kellie | McConnell | kellie_mcconnell@crapo.senate.gov | Health LA |
| Sen. Cruz (R-TX) | Alec | Aramanda | alec_aramanda@cruz.senate.gov | Health LA |
| Sen. Daines (R-MT) | Brad | Kehr | brad_kehr@daines.senate.gov | Health LA |
| Sen. Donnelly (D-IN) | Katie | Campbell | katie_campbell@donnelly.senate.gov | Health LA |
| Sen. Durbin (D-IL) | Claire | Grant | claire_grant@durbin.senate.gov | Health LA |
| Sen. Enzi (R-WY) | Elizabeth | Schwartz | elizabeth_schwartz@help.senate.gov | Health LA |
| Sen. Ernst (R-IA) | Andrea | Hechavarria | andrea_hechavarria@ernst.senate.gov | Health LA |
| Sen. Feinstein (D-CA) | Megan | Thompson | megan_thompson@feinstein.senate.gov | Health LA |

PRIVATE SPONSOR TRAVEL CERTIFICATION INFORMATION

List of Congressional Staff Invites for the Bipartisan Congressional Health Policy Conference

March 3-5, 2017

| | | | | |
|------------------------|------------------|--------------|---|-----------------|
| Sen. Fischer (R-NE) | Liz | Ruth | liz_ruth@fischer.senate.gov | Health LA |
| Sen. Flake (R-AZ) | Sarah | Towles | sarah_towles@flake.senate.gov | Health LA |
| Sen. Franken (D-MN) | Beth | Wikler | beth_wikler@franken.senate.gov | Health LA |
| Sen. Gardner (R-CO) | Alison | Toal | alison_toal@gardner.senate.gov | Health LA |
| Sen. Gillibrand (D-NY) | Alyson | Kelly | alyson_kelly@gillibrand.senate.gov | Health LA |
| Sen. Graham (R-SC) | Jessica-Phillips | Tyson | jessica-phillips_tyson@lgraham.senate.gov | Health LA |
| Sen. Hassan (D-ME) | McKenzie | Bennett | mckenzie_bennett@hassan.senate.gov | Health LA |
| Sen. Hatch (R-UT) | Jay | Khosla | jay_khosla@finance.senate.gov | Policy Director |
| Sen. Hatch (R-UT) | Matthew | Richardson | matthew_richardson@hatch.senate.gov | Health LA |
| Sen. Heinrich (D-NM) | Louis | Agnello | louis_agnello@heinrich.senate.gov | Health LA |
| Sen. Heitkamp (D-ND) | Megan | DesCamps | megan_descamps@heitkamp.senate.gov | Health LA |
| Sen. Heller (R-NV) | Emily | Wilkinson | emily_wilkinson@heller.senate.gov | Health LA |
| Sen. Hirono (D-HI) | Swarna | Vallurupalli | swarna_vallurupalli@hirono.senate.gov | Health LA |
| Sen. Hoeven (R-ND) | Shannon | Brown | shannon_brown@hoeven.senate.gov | Health LA |
| Sen. Inhofe (R-OK) | Jennifer | Bowman | jennifer_bowman@inhofe.senate.gov | Health LA |
| Sen. Isakson (R-GA) | Jordan | Bartolomeo | jordan_bartolomeo@isakson.senate.gov | Health LA |
| Sen. Johnson (R-WI) | Sean | Riley | sean_riley@ronjohnson.senate.gov | Health LA |
| Sen. Kaine (D-VA) | Kristen | Molloy | kristen_molloy@kaine.senate.gov | Health LA |
| Sen. King (I-ME) | Marge | Kilkelly | marge_kilkelly@king.senate.gov | Health LA |
| Sen. Klobuchar (D-MN) | Sarah | Smith | sarah_smith@klobuchar.senate.gov | Health LA |
| Sen. Lankford (R-OK) | Katherine | Wheeler | katherine_wheeler@lankford.senate.gov | Health LA |
| Sen. Leahy (D-VT) | Kathryn | Toomajian | kathryn_toomajian@leahy.senate.gov | Health LA |
| Sen. Lee (R-UT) | Leslie | Ford | leslie_ford@lee.senate.gov | Health LA |
| Sen. Manchin (D-WV) | Katherine | Cassling | katherine_cassling@manchin.senate.gov | Health LA |
| Sen. Markey (D-MA) | Avenel | Joseph | avenel_joseph@markey.senate.gov | Health LA |
| Sen. McCain (R-AZ) | David | Bennett | david_bennett@mccain.senate.gov | Health LA |
| Sen. McCaskill (D-MO) | Colleen | Bell | colleen_bell@mccaskill.senate.gov | Health LA |
| Sen. McConnell (R-KY) | Jennifer | Kuskowski | jennifer_conklin@mcconnell.senate.gov | Health LA |
| Sen. Menendez (D-NJ) | Michael | Barnard | michael_barnard@menendez.senate.gov | Health LA |
| Sen. Merkley (D-OR) | Susan | Lexer | susan_lexer@merkley.senate.gov | Health LA |
| Sen. Moran (R-KS) | Brian | Perkins | brian_perkins@moran.senate.gov | Health LA |

PRIVATE SPONSOR TRAVEL CERTIFICATION INFORMATION

List of Congressional Staff Invites for the Bipartisan Congressional Health Policy Conference

March 3-5, 2017

| | | | | |
|------------------------|--------------|----------------|--|-----------------|
| Sen. Murkowski (R-AK) | Garrett | Boyle | garrett_boyle@murkowski.senate.gov | Health LA |
| Sen. Murphy (D-CT) | Joe | Dunn | joe_dunn@murphy.senate.gov | Health LA |
| Sen. Murray (D-WA) | Nick | Bath | nick_bath@help.senate.gov | Health LA |
| Sen. Nelson (D-FL) | Corey | Malmgren | corey.malmgren@mail.house.gov | Health LA |
| Sen. Paul (R-KY) | Natalie | Burkhalter | natalie_burkhalter@paul.senate.gov | Health LA |
| Sen. Perdue (R-GA) | John | Eunice | john_eunice@perdue.senate.gov | Health LA |
| Sen. Peters (D-MI) | Greg | Mathis | greg_mathis@peters.senate.gov | Health LA |
| Sen. Portman (R-OH) | Sarah | Johnson | sarah_johnson@portman.senate.gov | Health LA |
| Sen. Reed (D-RI) | Jill | Brimmer | jill_brimmer@reed.senate.gov | Health LA |
| Sen. Risch (R-ID) | Rachel | Burkett | rachel_burkett@risch.senate.gov | Health LA |
| Sen. Roberts (R-KS) | Emily | Mueller | emily_mueller@roberts.senate.gov | Health LA |
| Sen. Rounds (R-SD) | Peter | Eckrich | peter_eckrich@rounds.senate.gov | Health LA |
| Sen. Rubio (R-FL) | Emily | Bouck | emily_bouck@rubio.senate.gov | Health LA |
| Sen. Sanders (I-VT) | Lori | Kearns | lori_earns@sanders.senate.gov | Health LA |
| Sen. Sasse (R-NE) | Alyene | Senger | alyene_senger@sasse.senate.gov | Health LA |
| Sen. Schatz (D-HI) | Aimee | Grace | aimee_grace@schatz.senate.gov | Health LA |
| Sen. Schumer (D-NY) | Veronica | Duron | veronica_duron@schumer.senate.gov | Health LA |
| Sen. Scott (R-SC) | Charles | Cogar | charles_cogar@scott.senate.gov | Health LA |
| Sen. Sessions (R-AL) | Mary Blanche | Hankey | maryblanche_hankey@sessions.senate.gov | Health LA |
| Sen. Shaheen (D-NH) | Alison | MacDonald | alison_macdonald@shaheen.senate.gov | Health LA |
| Sen. Shelby (R-AL) | Dayne | Cutrell | dayne_cutrell@shelby.senate.gov | Health LA |
| Sen. Stabenow (D-MI) | Kim | Corbin | kim_corbin@stabenow.senate.gov | Health LA |
| Sen. Sullivan (R-AK) | Kate | Wolgemuth | kate_wolgemuth@sullivan.senate.gov | Health LA |
| Sen. Tester (D-MT) | Monica | Carmean | monica_carmean@tester.senate.gov | Health LA |
| Sen. Thune (R-SD) | Dennis | D'Aquila | dennis_d'aquila@thune.senate.gov | Health LA |
| Sen. Tillis (R-NC) | Katy | French Talento | katy_frenchtalento@tillis.senate.gov | Health LA |
| Sen. Toomey (R-PA) | Brad | Grantz | brad_grantz@toomey.senate.gov | Health LA |
| Sen. Udall (D-NM) | Lauren | Arias | lauren_arias@tomudall.senate.gov | Health LA |
| Sen. Van Hollen (D-MD) | Bill | Dauster | bill_dauster@vanhollen.senate.gov | Policy Director |
| Sen. Van Hollen (D-MD) | Ziky | Ababiya | ziky_ababiya@vanhollen.senate.gov | Health LA |
| Sen. Warner (D-VA) | Marvin | Figueroa | marvin_figueroa@warner.senate.gov | Health LA |

PRIVATE SPONSOR TRAVEL CERTIFICATION INFORMATION

List of Congressional Staff Invitees for the Bipartisan Congressional Health Policy Conference

March 3-5, 2017

| | | | | |
|------------------------|-----------|--------------|--|-----------|
| Sen. Warren (D-MA) | Remy | Brim | remy_brim@warren.senate.gov | Health LA |
| Sen. Whitehouse (D-RI) | Jennifer | DeAngelis | jennifer_deangelis@whitehouse.senate.gov | Health LA |
| Sen. Wicker (R-MS) | Sarah | Lloyd Allred | sarahlloyd_allred@wicker.senate.gov | Health LA |
| Sen. Wyden (D-OR) | Thomas | Brunet | thomas_brunet@wyden.senate.gov | Health LA |
| Sen. Wyden (D-OR) | Elizabeth | Jurinka | elizabeth_jurinka@finance.senate.gov | Health LA |
| Sen. Todd Yound (R-IN) | Jaymi | Light | jaymi_light@young.senate.gov | Health LA |

DEBORAH SUE MAYER, CHIEF COUNSEL AND STAFF DIRECTOR
EMILY GERSHON, CHIEF CLERK

TELEPHONE: (202) 224-2981
FACSIMILE: (202) 224-7416
TDD: (202) 224-1752

² The term “any point throughout your trip” has a specific definition. See *id.* at 2.

THE UNIVERSITY OF CHICAGO

**SANTA FE:
120 SOUTH FEDERAL PLACE
SUITE 302
SANTA FE, NM 87501
505-988-6511**

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors): Alliance for Health Reform a non-partisan 501(c)(3) public charity and The Commonwealth Fund, a foundation that supports independent (continued)
2. Description of the trip: (see attached page)
3. Dates of travel: Friday, March 3 - Sunday March 5, 2017
4. Place of travel: The Airlie Center, Warrenton, VA
5. Name and title of Senate invitees: See attached list of Senate Invitees
6. I *certify* that the trip fits one of the following categories:
 - ☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
 - OR-**
 - ☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.

-AND-

☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I *certify* that:
 - ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
 - AND-**
 - ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. USE ONLY IF YOU CHECKED QUESTION 6(B)

USE ONLY IF YOU CHECKED QUESTION 3(d)
I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

- ☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

OR

- ☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment of the trip (see questions 6 and 10)*.

OR

- ☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. USE ONLY IF YOU CHECKED QUESTION 9(B)

USE ONLY IF YOU CHECKED QUESTION (3)
If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

The Alliance for Health Reform and The Commonwealth Fund jointly formulate the agenda, recruit appropriate speakers, and develop and compile resource materials for conference curriculum. Alliance staff

also organize lodging, travel, and event management for the conference with input from the Fund.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:
(see attached page)

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:
(see attached page)

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

(see attached page)

16. Total Expenses for Each Participant:

| | Transportation Expenses | Lodging Expenses | Meal Expenses | Other Expenses |
|--|----------------------------|---------------------|------------------|--------------------------------|
| <input checked="" type="checkbox"/> Good Faith estimate <input type="checkbox"/> Actual Amounts | \$26 | \$188 | \$170.30 | \$20; folder with materials |

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip is organized specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

(see attached page)

19. Name and location of hotel or other lodging facility:

Airlie; 6809 Airlie Road Warrenton, VA 20187

20. Reason(s) for selecting hotel or other lodging facility:

(see attached page)

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

The lodging rate for Warrenton, VA according to GSA is \$94.00 per night. Our rates at Airlie are currently, \$94/night. Our meal costs are also within the GSA total for three days in Warrenton, VA.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

The Alliance will organize chartered buses to allow for members and staff to all meet at a central location on Capitol Hill for travel to/from Airlie to decrease costs. Members and staff may also drive themselves.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

NA

25. I hereby *certify* that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.):

Signature of Travel Sponsor: Sarah Dash

Name and Title: Sarah Dash, President and Co-CEO

Name of Organization: Alliance for Health Reform

Address: 1444 I St NW, Suite 910, Washington, DC 20005

Telephone Number: (202)789-2300

Fax Number: (202)789-2233

E-mail Address: sarahdash@allhealth.org

The Alliance has a long history of performing educational activities. Since 1991, the Alliance has organized more than 500 forums in Washington and around the nation, each presenting a balance of expert views. The Alliance has published comprehensive guides for journalists on covering health issues and regularly produces online toolkits on current topics.

18. REASON FOR SELECTING THE LOCATION OF THE EVENT OR TRIP

The location was selected because of a need to balance proximity to Capitol Hill in order to accommodate the schedules of Members and staff and achieve our goal of reduced travel costs by allowing for bus or carpooling as the mode of transportation and yet be located outside of the Senate duty station. The Airlie is located in Fauquier County, Virginia.

The Alliance for Health Reform, in close collaboration with the Commonwealth Fund, undertook an extensive search of properties that met several key criteria:

- **Location:** Located a reasonable driving distance from Washington, D.C. and major airports for the convenience of Members of Congress and participating speakers, yet outside of the Washington, D.C. "duty station" for Members of Congress and their staff. The Airlie is located at 6809 Airlie Road in Warrington, Virginia, approximately 40-60 minutes from Dulles Airport (depending on traffic), and a 1-2 hour drive from the Capitol, depending on traffic. It is located in Fauquier County, Virginia. Other facilities we considered were either a significant driving distance from the
- **Facilities and logistics:** Conference facilities and rooming arrangements that can accommodate the conference; criteria include as space that can ensure safety and privacy for the Members, and any other high profile speakers that attend; meeting space and overnight accommodations that are located on the same property so as not to add additional travel time and distract from substantive programming; suitability of conference facilities and A/V capacity; and conference support staff that's suitable for hosting a conference as large and logistically complex as ours.
- **Cost:** Reasonable costs that can meet the conference budget. The Alliance has negotiated the lowest possible food costs at Airlie, selecting the most reasonable food costs on the available menu. These are the market rates for conference facilities that meet all of our criteria.
- **Timing:** preferred date availability to coincide with anticipated congressional availability

After this extensive search and a site visit by Alliance and Fund staff, we believe Airlie is the best option for the 2017 conference.

Other facilities considered: A list of additional properties considered for the conference is shown below. Highlighted properties were visited but found not to have adequate facilities for our conference, and other conference facilities were assessed via internet and phone research. Many of the other venues listed do not have adequate facilities for our conference or are a longer drive from major airports than the Airlie, potentially creating an obstacle to attendance by Members of Congress, making it more difficult to recruit top-quality speakers, and increasing transportation costs. The other venues with appropriate facilities had comparable or more expensive food costs compared to the Airlie.

20. REASONS(S) FOR SELECTING HOTEL OR OTHER LODGING FACILITY

In addition to a location that met the goals described in 18, above, we sought a facility that was low cost yet had sufficiently capable conference facilities and staff with modern audio/visual accommodations. The Airlie meets those needs. It has an excellent reputation for its conference management services with a highly qualified staff. Yet it is by no means luxurious. It is modestly comfortable which will facilitate the number of hours that conference participants will participate in learning sessions and issue discussions.

U.S. Senate
Committee on Ethics
PRIVATE SPONSOR TRAVEL CERTIFICATION INFORMATION
List of Congressional Invitees for the Bipartisan Congressional Health Policy Conference
March 3-5, 2017

| First Name | Last Name | Credentials | State | Reason for Invitation |
|-------------|------------|-------------|-------|--|
| Lisa | Murkowski | | AK | Member of Committee on Health, Education, Labor & Pensions |
| Dan | Sullivan | | AK | Member of Senate Veterans' Affairs Committee |
| Jeff | Sessions | | AL | Member of the Senate Rural Health Caucus |
| Richard | Shelby | | AL | Member of the Senate Cancer Coalition |
| John | Boozman | | AR | Member of Senate Appropriations Committee |
| Tom | Cotton | | AR | Member of Joint Economic Committee |
| Jeff | Flake | | AZ | Member of Senate Judiciary Committee |
| John | McCain | | AZ | Member of the Senate Rural Health Caucus |
| Kamala | Harris | | CA | Member of the Senate Committee on Budget |
| Dianne | Feinstein | | CA | Member of the Senate Cancer Coalition |
| Michael | Bennet | | CO | Member of Committee on Health, Education, Labor & Pensions |
| Cory | Gardner | | CO | Member of Senate Committee on Small Business and Entrepreneurship |
| Richard | Blumenthal | | CT | Member of Senate Judiciary Committee |
| Christopher | Murphy | | CT | Member of Committee on Health, Education, Labor & Pensions |
| Thomas | Carper | | DE | Member of Committee on Finance |
| Chris | Coons | | DE | Member of Senate Appropriations Committee |
| Bill | Nelson | | FL | Member of Committee on Finance |
| Marco | Rubio | | FL | Member of Senate Committee on Small Business and Entrepreneurship |
| Johnny | Isakson | | GA | Member of Committee on Health, Education, Labor & Pensions |
| David | Perdue | | GA | Member of Senate Budget Committee |
| Mazie | Hirono | | HI | Member of Senate Veterans' Affairs Committee |
| Brian | Schatz | | HI | Member of Senate Appropriations Committee |
| Charles | Grassley | | IA | Member of Committee on Finance |
| Joni | Ernst | | IA | Member of Senate Committee on Small Business and Entrepreneurship |
| Michael | Crapo | | ID | Member of Committee on Finance |
| Jim | Risch | | ID | Member of Congressional Multiple Sclerosis Caucus |
| Richard | Durbin | | IL | Member of the Senate Cancer Coalition |
| Tammy | Duckworth | | IL | Interest in Health Care |
| Todd | Young | | IN | Member of Senate Committee on Health, Education, Labor, and Pensions |
| Joe | Donnelly | | IN | Member of Coalition for Autism Research and Education (CARE) |
| Jerry | Moran | | KS | Member of Senate Appropriations Committee |
| Pat | Roberts | | KS | Member of Committee on Health, Education, Labor & Pensions |
| Mitch | McConnell | | KY | Member of the Senate Rural Health Caucus |
| Rand | Paul | MD | KY | Member of Committee on Health, Education, Labor & Pensions |
| Bill | Cassidy | MD | LA | Member of Committee on Health, Education, Labor & Pensions |
| Elizabeth | Warren | | MA | Member of Committee on Health, Education, Labor & Pensions |
| Edward | Markey | | MA | Member of Coalition for Autism Research and Education (CARE) |
| Benjamin | Cardin | | MD | Member of Committee on Finance |
| Chris | Van Hollen | | MD | Member of Committee on Appropriations |
| Susan | Collins | | ME | Member of Committee on Health, Education, Labor & Pensions |
| Angus | King | | ME | Member of Senate Budget Committee |
| Gary | Peters | | MI | Member of Joint Economic Committee |
| Debbie | Stabenow | | MI | Member of Committee on Finance |
| Al | Franken | | MN | Member of Committee on Health, Education, Labor & Pensions |
| Amy | Klobuchar | | MN | Member of Senate Judiciary Committee |
| Roy | Blunt | | MO | Member of Senate Appropriations Committee |
| Claire | McCaskill | | MO | Member of Congressional Caucus for Women's Issues |
| Thad | Cochran | | MS | Member of the Senate Rural Health Caucus |
| Roger | Wicker | | MS | Member of Senate Budget Committee |
| Steve | Daines | | MT | Member of Senate Appropriations Committee |
| Jon | Tester | | MT | Member of the Senate Rural Health Caucus |

| First Name | Last Name | Credentials | State | Reason for Invitation |
|------------|--------------|-------------|-------|---|
| Richard | Burr | | NC | Member of Committee on Health, Education, Labor & Pensions |
| Thom | Tillis | | NC | Member of Senate Judiciary Committee |
| John | Hoeven | | ND | Member of Senate Appropriations Committee |
| Heidi | Heitkamp | | ND | Member of Senate Diabetes Caucus |
| Deb | Fischer | | NE | Member of Congressional Caucus for Women's Issues |
| Ben | Sasse | | NE | Member of Joint Economic Committee |
| Maggie | Hassan | | NH | Member of Committee on Health, Education, Labor & Pensions |
| Jeanne | Shaheen | | NH | Member of Senate Appropriations Committee |
| Robert | Menendez | | NJ | Member of Committee on Finance |
| Cory | Booker | | NJ | Member of Senate Committee on Small Business and Entrepreneurship |
| Martin | Heinrich | | NM | Member of Joint Economic Committee |
| Tom | Udall | | NM | Member of Senate Appropriations Committee |
| Dean | Heller | | NV | Member of Committee on Finance |
| Catharine | Cortez Matso | | NV | Member of Senate Special Committee on Aging |
| Charles | Schumer | | NY | Member of Committee on Finance |
| Kirsten | Gillibrand | | NY | Member of the Congressional Task Force on Alzheimer's Disease |
| Sherrod | Brown | | OH | Member of Committee on Finance |
| Rob | Portman | | OH | Member of Committee on Finance |
| James | Inhofe | | OK | Member of the Senate Rural Health Caucus |
| James | Lankford | | OK | Member of Senate Appropriations Committee |
| Jeff | Merkley | | OR | Member of Senate Appropriations Committee |
| Ron | Wyden | | OR | Member of Committee on Finance |
| Bob | Casey | | PA | Member of Committee on Health, Education, Labor & Pensions |
| Patrick | Toomey | | PA | Member of Committee on Finance |
| Jack | Reed | | RI | Member of the Senate Cancer Coalition |
| Sheldon | Whitehouse | | RI | Member of Committee on Health, Education, Labor & Pensions |
| Lindsey | Graham | | SC | Member of the Senate Rural Health Caucus |
| Tim | Scott | | SC | Member of Committee on Health, Education, Labor & Pensions |
| Mike | Rounds | | SD | Member of Senate Veterans' Affairs Committee |
| John | Thune | | SD | Member of Committee on Finance |
| Lamar | Alexander | | TN | Member of Committee on Health, Education, Labor & Pensions |
| Bob | Corker | | TN | Member of the Senate Rural Health Caucus |
| John | Cornyn | | TX | Member of Committee on Finance |
| Ted | Cruz | | TX | Member of Joint Economic Committee |
| Orrin | Hatch | | UT | Member of Committee on Health, Education, Labor & Pensions |
| Mike | Lee | | UT | Member of Senate Judiciary Committee |
| Tim | Kaine | | VA | Member of Senate Budget Committee |
| Mark | Warner | | VA | Member of Committee on Finance |
| Patrick | Leahy | | VT | Member of the Senate Rural Health Caucus |
| Bernard | Sanders | | VT | Member of Committee on Health, Education, Labor & Pensions |
| Maria | Cantwell | | WA | Member of Committee on Finance |
| Patty | Murray | | WA | Member of Committee on Health, Education, Labor & Pensions |
| Tammy | Baldwin | | WI | Member of Committee on Health, Education, Labor & Pensions |
| Ron | Johnson | | WI | Member of Senate Budget Committee |
| Shelley | Capito | | WV | Member of Senate Appropriations Committee |
| Joe | Manchin | | WV | Member of Senate Veterans' Affairs Committee |
| John | Barrasso | MD | WY | Member of the Senate Rural Health Caucus |
| Michael | Enzi | | WY | Member of Committee on Health, Education, Labor & Pensions |

PRIVATE SPONSOR TRAVEL CERTIFICATION INFORMATION

List of Congressional Staff Invites for the Bipartisan Congressional Health Policy Conference

March 3-5, 2017

| Member | First Name | Last Name | Email | Title |
|------------------------|--------------|-------------|--------------------------------------|-----------|
| Sen. Alexander (R-TN) | Mary-Sumpter | Lapinski | marysumpter_lapinski@help.senate.gov | Health LA |
| Sen. Baldwin (D-WI) | Kathleen | Laird | kathleen_laird@baldwin.senate.gov | Health LA |
| Sen. Barrasso (R-WY) | Jay | Eberle | jay_eberle@barrasso.senate.gov | Health LA |
| Sen. Bennet (D-CO) | Rohini | Kosoglu | rohini_kosoglu@bennet.senate.gov | Health LA |
| Sen. Blumenthal (D-CT) | Laurel | Sakai | laurel_sakai@blumenthal.senate.gov | Health LA |
| Sen. Blunt (R-MO) | Desiree | Mowry | desiree_mowry@blunt.senate.gov | Health LA |
| Sen. Booker (D-NJ) | Ashley | Eden | ashley_eden@booker.senate.gov | Health LA |
| Sen. Boozman (R-AR) | Jennifer | Humphrey | jennifer_humphrey@boozman.senate.gov | Health LA |
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PRIVATE SPONSOR TRAVEL CERTIFICATION INFORMATION

List of Congressional Staff Invitees for the Bipartisan Congressional Health Policy Conference

March 3-5, 2017

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PRIVATE SPONSOR TRAVEL CERTIFICATION INFORMATION
List of Congressional Staff Invites for the Bipartisan Congressional Health Policy Conference
March 3-5, 2017

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Bipartisan Congressional Health Policy Conference
Airlie Center, Warrenton, Virginia
March 3-5, 2017

Achieving a Patient-Centered Health System
(DRAFT 1/13/17 – all speakers confirmed unless otherwise noted)

Friday, March 3

6:00-7:00 p.m. Opening Reception

7:00-9:00 p.m. **Dinner**

1a. Welcome and Introductions

1b. Patients as Innovation Partners: A Charge for the Weekend

Keynote Speakers:

- Steven Keating, research affiliate, Massachusetts Institute of Technology
- Sharon Terry, President and Chief Executive Officer, Genetic Alliance

Saturday, March 4

8:00-8:45 a.m. 2. Breakfast: Building Delivery Systems with the Patient at the Center

Panelists:

- Whitney Bowman-Zatzkin, Director, Flip the Clinic
- K. Eric De Jonge, Director of Geriatrics, MedStar Washington Hospital Center

9:00-10:15 a.m. 3. Medicare and Chronic Disease

Panelists:

- Ken Thorpe, Chairman, Partnership to Fight Chronic Disease, and Robert W. Woodruff Professor and Chair, Department of Health Policy and Management, Rollins School of Public Health, Emory University
- Rebecca Onie, Co-Founder and Chief Executive Officer, Health Leads
- Michael Le, Co-Founder and Chief Medical Officer, Landmark Health

10:15 -11:30 a.m.

4. Caring for Dually Eligible Medicare-Medicaid Patients

Panelists:

- Melanie Bella, Independent Consultant (*invited*)
- Cindi Jones, Director, Department of Medical Assistance Services, Commonwealth of Virginia
- TBD

11:45 -1:00 p.m.

5. Lunch Discussion: Prescription Drug Spending and Policy – Where Are We and Where Are We Headed?

Keynote Speakers:

- Mark McClellan, Director and Robert J. Margolis, MD, Professor of Business, Medicine and Health Policy, Duke University (*invited*)
- Henry Waxman, Chairman, Waxman Strategies

1:15-2:15 p.m.

6. Continuing the Conversation: Ensuring Patient Access to Affordable Prescription Drugs

Panelists:

- Elizabeth Seeley, Adjunct Lecturer on Health Policy and Management, Harvard T.H. Chan School of Public Health
- Aaron Kesselheim, Associate Professor, Harvard Medical School, and Faculty Member, Brigham and Women's Hospital
- Diana Zuckerman, President, National Center for Health Research

2:15-3:30 p.m.

7. Democratization of Health Data: Getting Usable Health Information in the Hands of Patients and Caregivers

Panelists:

- Karen DeSalvo, Acting Assistant Secretary of Health, U.S. Department of Health and Human Services (*invited*)
- Christine Bechtel, President, Bechtel Health Advisory Group
- Jeremy Marut, Director of Enterprise Architecture, Hackensack University Medical Center
- Jim Jirjis, Chief Health Information Officer, Vice President – Clinical Services Group, HCA

7:00-7:45 p.m.

Reception

8:00-9:15 p.m.

8. Dinner Keynote: Patient-Centered Research: Forging New Paths

Keynote Speaker:

- Eric Dishman, Director, All of Us Research Program, National Institutes of Health (*invited*)

8:15-9:00 a.m. Breakfast Buffet

9.00-10:30 a.m. 9. Charting the Future of Medicaid and the Role of the States

Panelists:

- Frederick Isasi, Division Director, National Governors Association Center for Best Practices
- Joe Moser, Director, Indiana Medicaid
- Thomas Betlatch, Director, Arizona Health Care Cost Containment System

10:30-12:00 pm 10. Stabilizing the Private Insurance Market

Panelists:

- Joel Ario, Managing Director, Manatt Health
- Cori Uccello, Actuary and Senior Health Fellow, American Academy of Actuaries
- Avik Roy, Opinion Editor, *Forbes*

| | |
|------------|------------------------|
| 12:00 p.m. | Closing Remarks |
|------------|------------------------|

12:15 p.m. **Adjourn**